

100

SIEBEL On Demand

Home

Calendar

Leads

Accounts

Contacts

Opportunities

Forecasts

Reports

Solutions

Services

Forecast Definition

Help Tutorial Back

Step 1

Step 2

Step 3

Next Cancel

Next Cancel

Select your Forecast Snapshot Frequency

Week

Create Forecast Snapshot Each*

* = Required Field

202

Fig 2

© 2002 Siebel Systems, Inc. All Rights Reserved.
Call Center Support is available 24/7.

File Edit View Favorites Tools Help

Back Search Favorites Media Google

Address: https://adL.siebel.com/OnDemand/user/Forecasting

Go

Search Web

Search Site

PagePrint

Print

SIEBEL
ARM OnDemand

Search

Contacts

Advanced Search

Submit

Create

Task

Appointment

Contact

Opportunity

Account

Lead

Service Request

Solution

Home

Calendar

Leads

Accounts

Contacts

Opportunities

Forecasts

Reports

Solutions

Services

Forecast Definition

Help

Tutorial

Back

Step 1

Step 2

Step 3

Previous Next Cancel

Previous Next Cancel

Select your Forecast Snapshot Auto Forecast Date

Forecast Snapshot Day* Sunday

* = Required Field

302

Fig. 3

Home | Calendar | Leads | Accounts | Contacts | Opportunities | Forecasts | Reports | Solutions | Services | Tutorial | Back

© 2003 Siebel Systems, Inc. All Rights Reserved.

Get the latest information on Siebel Systems products and services.

Get the latest information on Siebel Systems products and services.

Internet

400

500

SIEBEL
CRM OnDemand

- Search
- Contacts
 - Advanced Search
 - Create
 - Task
 - Appointment
 - Contact
 - Opportunity
 - Account
 - Lead
 - Service Request
 - Solution

Home: [1] Calendar [2] Leads [3] Accounts [4] Contacts [5] Opportunities [6] Forecasts [7] Reports [8] Solutions [9] Service [10] [Print Friendly](#)

Forecast Homepage [Help](#) [Tutorial](#) [Back](#)

Forecast Homepage					Previous View																									
					A B C D E F G H I J K L M N O P Q R S T U V W X Y Z																									
Status	Forecast Date	Pipeline	Forecast	Closed Revenue	Owner																									
Active	9/21/2003	\$55,050,000.00	\$43,950,000.00	\$7,800,000.00	Ethan Phillips																									
Active	9/21/2003	\$55,050,000.00	\$43,950,000.00	\$7,800,000.00	Joan Williams																									
Active	9/21/2003	\$35,450,000.00	\$27,550,000.00	\$1,400,000.00	Ryan Taylor																									
Active	9/21/2003	\$10,400,000.00	\$7,200,000.00	\$3,200,000.00	Rick Rogers																									
Active	9/21/2003	\$0.00	\$0.00	\$0.00	Lisa Waller																									
Active	10/12/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Ethan Phillips																									
Active	10/12/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Joan Williams																									
Active	10/12/2003	\$2,800,000.00	\$2,800,000.00	\$0.00	Ryan Taylor																									
Active	10/12/2003	\$5,250,000.00	\$4,200,000.00	\$0.00	Rick Rogers																									
Active	10/12/2003	\$0.00	\$0.00	\$0.00	Lisa Waller																									
Active	10/19/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Ethan Phillips																									
Active	10/19/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Joan Williams																									
Active	10/19/2003	\$2,800,000.00	\$2,800,000.00	\$0.00	Ryan Taylor																									
Active	10/19/2003	\$5,250,000.00	\$4,200,000.00	\$0.00	Rick Rogers																									
Active	10/19/2003	\$0.00	\$0.00	\$0.00	Lisa Waller																									
Active	10/26/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Ethan Phillips																									
Active	10/26/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Joan Williams																									
Active	10/26/2003	\$2,800,000.00	\$2,800,000.00	\$0.00	Ryan Taylor																									
Active	10/26/2003	\$5,250,000.00	\$4,200,000.00	\$0.00	Rick Rogers																									
Active	10/26/2003	\$0.00	\$0.00	\$0.00	Lisa Waller																									
Active	11/2/2003	\$13,150,000.00	\$11,400,000.00	\$0.00	Ethan Phillips																									
Active	11/2/2003	\$13,150,000.00	\$11,400,000.00	\$0.00	Joan Williams																									
Active	11/2/2003	\$3,000,000.00	\$3,000,000.00	\$0.00	Ryan Taylor																									
Active	11/2/2003	\$5,600,000.00	\$4,550,000.00	\$0.00	Rick Rogers																									
Active	11/2/2003	\$0.00	\$0.00	\$0.00	Lisa Waller																									

Number of records displayed: 25

Fig. 5

501
502
503

600

2601

2602

603

Home ☐ Calendar ☐ Leads ☐ Accounts ☐ Contacts ☐ Opportunities ☐ Forecasts ☐ Reports ☐ Solutions ☐ Service ☐

Forecast Detail

Created for: Joan Williams Create Date: 9/21/2003 Status: Active

Forecast Summary				
Date	Quota	Closed Revenue	Quota %	Forecast
7/1/2003		\$3,450,000.00	0%	\$25,200,000.00
8/1/2003		\$2,350,000.00	0%	\$5,950,000.00
9/1/2003		\$2,000,000.00	0%	\$12,800,000.00
Totals	\$0.00	\$7,800,000.00		\$43,950,000.00

Date	Quota	Closed Revenue	Quota %	Forecast	Best Case	Pipeline	Expected Revenue
7/1/2003		\$3,450,000.00	0%	\$25,200,000.00	\$0.00	\$33,100,000.00	\$11,975,017.30
8/1/2003		\$2,350,000.00	0%	\$5,950,000.00	\$0.00	\$5,950,000.00	\$4,869,997.65
9/1/2003		\$2,000,000.00	0%	\$12,800,000.00	\$0.00	\$16,000,000.00	\$9,470,000.00
Totals	\$0.00	\$7,800,000.00		\$43,950,000.00	\$0.00	\$55,050,000.00	\$26,315,014.95

Team's Summary by Month							
Owner Alias	Date	Quota %	Forecast	Closed Revenue	Best Case	Pipeline	Last Updated
RR ROGERS	7/1/2003	0%	\$1,600,000.00	\$1,200,000.00	\$0.00	\$1,600,000.00	9/21/2003 11:23:38 PM
RR ROGERS	8/1/2003	0%	\$2,400,000.00	\$800,000.00	\$0.00	\$2,400,000.00	9/21/2003 11:23:38 PM
RR ROGERS	9/1/2003	0%	\$3,200,000.00	\$1,200,000.00	\$0.00	\$6,400,000.00	9/21/2003 11:23:38 PM
RT TAYLOR	7/1/2003	0%	\$21,600,000.00	\$1,050,000.00	\$0.00	\$29,500,000.00	9/21/2003 11:23:37 PM
RT TAYLOR	8/1/2003	0%	\$350,000.00	\$350,000.00	\$0.00	\$350,000.00	9/21/2003 11:23:37 PM
Totals			\$34,750,000.00	\$4,600,000.00	\$0.00	\$45,850,000.00	

Show Full List

Opportunities							
Close Date	Forecasted	Opportunity Name	Account Name	Revenue	Sales Stage	Next Step	
9/3/2003	Y	Bay Construction - Std Order - 5 Phoenix 900	Bay Construction	\$400,000.00	6 - Closed/Won	Call	
9/3/2003	Y	Bay Demolition Services - Std Order - 5 Phoenix 900	Bay Demolition Services	\$400,000.00	7 - Closed/Lost	E-mail	
9/30/2003	Y	Bobcat Loaders & Excavators - Std Order - 5 Phoenix 900	Bobcat Loaders & Excavators	\$400,000.00	3 - Short List	None	
9/18/2003	Y	Cartier's Ramping & Supply - Std Order - 5 Phoenix 900	Cartier's Ramping & Supply	\$400,000.00	6 - Closed/Won	None	

700

701

SEARCH
CRM ON DEMAND

Search:

Contacts:

Advanced Search:

Criteria:

Task:

Appointment:

Contact:

Opportunity:

Account:

Lead:

Service Request:

Solution:

Home | ☐ Calendar | ☐ Leads | ☐ Accounts | ☐ Contacts | ☐ Opportunities | ☐ Forecasts | ☐ Reports | ☐ Solutions | ☐ Service | ☐ Forecast Edit | ☐ Help | ☐ Tutorial | ☐ Back

Forecast Summary					Refresh/Class	
Forecast Date	Closed Revenue	Forecast	Best Case	Pipeline	Expected Revenue	
9/1/2003	\$3,450,000.00	\$25,200,000.00	\$0.00	\$33,100,000.00	\$11,975,017.30	
9/1/2003	\$2,350,000.00	\$5,950,000.00	\$0.00	\$5,950,000.00	\$4,869,997.65	
9/1/2003	\$2,000,000.00	\$12,800,000.00	\$0.00	\$16,000,000.00	\$9,470,000.00	
Totals	\$7,800,000.00	\$43,950,000.00	\$0.00	\$55,050,000.00	\$26,315,014.95	

Home | ☐ Calendar | ☐ Leads | ☐ Accounts | ☐ Contacts | ☐ Opportunities | ☐ Forecasts | ☐ Reports | ☐ Solutions | ☐ Service | ☐ Forecast Edit | ☐ Help | ☐ Tutorial | ☐ Back

Fig 7